Atty

Shehadey, Vanessa Lynn (for Ted and Norma Miller – Parents – Co-Conservators – Petitioners)
(1) Report of Conservators, Petition for Authority to Pay Attorneys' Fees and Costs and (2) Withdrawal of Funds from Blocked Account (Prob. C. 1850, 2640 and 2642)

Age: 36	TED and NORMA MILLER, Parents and Co-	NEEDS/PROBLEMS/COMMENTS:
	Conservators of the Person and Estate without bond, are Petitioners.	Minute Order 8-22-12: Counsel is
		directed to submit a declaration
Cont. from 072512,	Background: Jocelyn received a settlement as a	regarding the household budget as
082212	result of a motor vehicle accident while she was still a minor. Her parents (Petitioners) were previously	well as any improvements made and paid by the Millers.
Aff.Sub.Wit.	appointed as guardians of her estate and were	paid by ine winers.
✓ Verified	appointed as godinalars of her person and estate in	
Inventory	1994. The Conservatee also has a trust that owns the	
PTC Not Const.	home where they reside, which was specially	
Not.Cred. V Notice of Hrg	designed for the conservatee's needs. At that time,	
✓ Aff.Mail W	the Court waived accountings, but required	
Aff.Pub.	budgets and reports. The 2012 Budget was filed on	
Sp.Ntc.	1-20-12. The order approving the last report was	
Pers.Serv.	signed on 7-27-11.	
Conf. Screen	Beginning POH: \$707,546.74	
Letters	Ending POH: \$700,211.46	
Duties/Supp	(\$637,179.55 in a blocked account, \$6,797.96 in an	
Objections	unblocked account, and a handicap equipped	
Video Receipt	vehicle)	
CI Report	Conservators: Waived	
9202		
✓ Order	Attorney: \$300.00 (budget and report)	
Aff. Posting		Reviewed by: skc
Status Rpt	Costs: \$420.00 (filing fee, certified copies)	Reviewed on: 10-1-12
UCCJEA	Petitioners state:	Updates:
Citation	 Pursuant to Court Order 9-5-07, \$4,800/mo is 	Recommendation:
FTB Notice	Pursuant to Court Order 9-5-07, \$4,800/mo is withdrawn from the conservatee's blocked Merrill Lynch cash management account and deposited to the unblocked Merrill Lynch cash management account for monthly expenses.	File 1A - Miller
	The annual budget filed 1-20-12 provides an itemized list that specifies the estimated expenses in 2012, which is based on 2011 expenses. Budget items include Home Health Aide (\$18,000.00), Health Insurance (\$1,900.00), Physical Therapy (\$1,900.00), house and vehicle expenses, CPA/attorney, misc., home upkeep and repair (utilities, pool, phone, taxes, etc.)	

Shehadey, Vanessa Lynn (for Ted and Norma Miller – Parents – Co-Conservators – Petitioners)
Withdrawal of Funds from Blocked Account

Age	e: 36		TED and NORMA MILLER, Parents and Co-Conservators, are	NEEDS/PROBLEMS/
			Petitioners.	COMMENTS:
	Aff.Sub.Wit.		On 9-21-12, Petitioners filed an Ex Parte Petition for Withdrawal of Funds from Blocked Account. The Court set the matter for hearing on 10-3-12.	
~	Verified			
	Inventory		Petitioners request \$7,495.13 from the blocked conservatorship account for the purchase and installation of a 13 SEER 5-ton air	
	PTC		conditioning unit at the residence owned by the Conservatee.	
	Not.Cred.		Petitioners state the current balance of the account is	
~	Notice of Hrg		\$637,179.55.	
>	Aff.Mail	W		
	Aff.Pub.		A copy of a handwritten note attached to the petition states the	
	Sp.Ntc.		coil on the unit cannot be repaired or replaced. New coils are larger and won't fit in current space. New units are shorter so the	
	Pers.Serv.		coil will fit. The leaking coil will cause the compressor to fail in the	
	Conf. Screen		condensing (outside) unit. It is not compatible with a new	
	Letters		heating unit and coil. Both units must be replaced. We have	
	Duties/Supp		already replaced both units that heat and cool the bedrooms	
	Objections Video		and the rest of the back of the house two years ago.	
	Receipt		A copy of an invoice attached to the petition indicates an	
	CI Report		estimate of \$7,500.00, and a copy of a letter dated 8-14-12	
	9202		indicates the specific estimate for installation of the following	
~	Order		items and labor/warranties:	
	Aff. Posting		One 13 SEER 5-ton air conditioning GOODMAN condensing	Reviewed by: skc
	Status Rpt		unit in the existing location of present ground mounted air	Reviewed on: 10-1-12
-	UCCJEA		conditioning unit.One 13 SEER 5-ton air conditioning indoor cooling coil with	Updates:
	Citation		TXV in the exiting location of present cooling coil.	Recommendation:
	FTB Notice		One 80% up flow natural gas furnace in the existing location	File 1B - Miller
			of present gas furnace.	
			One additional 2-pole fused electrical disconnect.	
			One electronic programmable setback or manual	
			thermostat	
			Items not included in proposal:	
			Replacement of existing ceiling supply and return filter grill	
			Fresno City/County Building Permits	
			Fresno County required ductwork testing	
			Any necessary ductwork repair/replacing which was found to be alofe at all by the strings.	
			to be defected by required testing	

Kruthers, Heather H (for Petitioner/Conservator Public Guardian)

(1) Second Account Current and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator and Attorney [Prob. C. 2620; 2623; 2942]

Age: 97 years			PUBLIC GUARDIAN, Conservator, is	NEEDS/PROBLEMS/COMMENTS:
			petitioner.	
			Account period: 7/1/10 – 6/30/12	Note: If the petition is granted, a
<u> </u>			Accounting - \$2,627,177.69	status hearing will be set for the
Co	nt. from Aff.Sub.Wit.	l	Beginning POH - \$2,583,184.38	filing as follows:
_	Verified		Ending POH - \$2,362,575.27	
✓	vermea		(\$230,482.36 is cash)	Friday, September 5, 2014 at
	Inventory			9:00 a.m. in Department 303,
	PTC		Conservator - \$3,953.68 (25.43	for the filing of the third account.
	Not.Cred.		Deputy hours @ \$96/hr and 19.90 Staff hours	decoorn.
✓	Notice of Hrg		@ \$76/hr)	Pursuant to Local Rule 7.5 if the
√	Aff.Mail	W/	Attorney - \$2,500.00 (per	required documents are filed 10
	Aff.Pub.		Local Rule)	days prior the date set the status
1	Sp.Ntc.	W/	,	hearing will come off calendar
Ě	· ·	'''	Bond fee - \$1, 544.14 (o.k.)	and no appearance will be
	Pers.Serv.			required.
	Conf. Screen Letters		Petitioner prays for an Order:	
			 Approving, allowing and settling the second account. 	
	Duties/Supp		second account. 2. Authorizing the conservator and	
	Objections Video		attorney fees and commissions	
	Receipt		3. Payment of the bond fee	
	CI Report			
	9202		Court Investigator Jennifer Young's Report	
√	Order		filed on 9/14/12.	
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 9/28/12
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 2 - Ohanesian

Ormond, John K. (for Rebecca Lewis – Mother – Trustee)

Status Conference Re: Amended Fifth and Sixth Accounts; Seventh Accounting

T	Status Conference Re: Amended Fifth and Si	xin Accounis; sevenin Accouniing
		NEEDS/PROBLEMS/COMMENTS:
		CONTINUED TO 10-15-12
		CONTINUED TO 10-15-12
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: skc
Status Rpt		Reviewed on:
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 3A - MacIsaac

Ormond, John K. (for Rebecca Lewis – Mother – Trustee)

Petition for Modification of Special Needs Trust and for Order Directing Distribution of Trust Assets to Claimants

		NEEDS/PROBLEMS/COMMENTS:
		CONTINUED TO 10-15-12
	=	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: skc
Status Rpt		Reviewed on:
UCCJEA		Updates:
Citation	_	Recommendation:
FTB Notice		File 3B - MacIsaac

Atty

Charlene G. Jones (Estate)

Barrus, John E. (for Walter G. Jones – Executor – Petitioner)

(1) Petition for Final Distribution on Waiver of Accounting and (2) for Allowance of Fees [Prob. C. 11600; 10830]

DOD: 2-24-09	WALTER G. JONES , Executor with Full IAEA without bond, is Petitioner.	NEEDS/PROBLEMS/ COMMENTS:
	Accounting is waived.	Minute Order 9-12-12: The
	1&A: \$ 240,000.00 (residence)	Court is advised that they are
Cont. from 091212	POH: \$ 1,500.00 (cash in attorney trust account)	still waiting on Bank of America.
Aff.Sub.Wit.	Executor (Statutory): Waived	
✓ Verified	Attorney (Statutory): \$6,550.00	As of 9-27-12, nothing further has been filed.
✓ Inventory	Costs: \$435.00 (filing)	nas been mea.
PTC Not Cred	Petitioner states that except for the funds held in the attorney	Note: As sole heir pursuant to
✓ Not.Cred. ✓ Notice of Hrg	trust account, there are no remaining assets of the estate.	Decedent's will, Petitioner
✓ Aff.Mail W	Petitioner states he obtained a line of credit for about	waived accounting; however, under Probate
Aff.Pub.	\$65,000.00 against the residence and took a draw against the line of credit for about \$65,000.00, less \$6,650.00 in loan	Code § 10954(c) (2), a creditor
Sp.Ntc.	processing and appraisal fees, a loan broker fee of	whose interest has not been satisfied may petition for
Pers.Serv.	\$6,000.00, a document preparation fee of \$750.00, and	account.
Conf. Screen	prepaid interest in the amount of \$13,750.00, resulting in a net distribution to Petitioner of about \$37,850.00. Except for	The Bank of America
✓ Letters	\$3,062.00 used for residence maintenance expenses,	Creditor's Claim was allowed, but is not paid.
Duties/Supp Objections	Petitioner advises the Court that he used the remaining portion of the draw for his personal living expense, including	·
Video	a new business venture, against the advice of his counsel.	Examiner notes that Notice of Hearing was mailed to the
Receipt	Petitioner subsequently sold the real property, at which time	creditor on 8-10-12. Nothing
CI Report	all amounts owed on the property, including the line of	has been filed.
→ 9202	credit, were paid. Petitioner received \$19,887.02 from the sale, and again, contrary to the advice of his counsel, used	SEE PAGE 2
✓ Order Aff. Posting	the proceeds to pay for his own medical expenses.	Reviewed by: skc
Status Rpt	Petitioner states his only income is approx. \$880.00/month	Reviewed by: 3xC
UCCJEA	from Social Security, and prior to the sale, Petitioner had suffered a serious stroke. Petitioner apologizes to the Court	Updates:
Citation	and asks the Court's forgiveness for his lapse in judgment in	Recommendation:
✓ FTB Notice	using estate funds to pay his own expenses.	File 4 - Jones
	Petitioner states that the \$1,500.00 remaining in the attorney trust account will be used toward attorney fees and costs,	
	and that he will assume personal responsibility for payment	
	of the remainder of the attorney fees and the creditor's claim of Bank of America (\$1,965.21) by assigning liens on a	
	future inheritance (attached).	
	Petitioner prays for an Order confirming and approving his	
	acts and proceedings, ordering his personal liability to pay the creditor's claim and the balance of the attorney fees in	
	accordance with the "Priority Assignment of Beneficial	
	Interest in Estate of Dorothy Jones Ripperdan" and	
	"Secondary Assignment," and distribution of property now now known or discovered to Petitioner.	
		4

4 Charlene G. Jones (Estate)

Case No. 09CEPR00579

Declaration of Attorney Barrus filed 9-11-12 states the executor did not advise him that he was borrowing the money to fund a business. He advised his client that the funds could only be used for estate purposes and could not be distributed without court approval. The executor had no money to pay the operating expenses of the residence such as property taxes, utilities, repair and maintenance, and to pay creditors.

Mr. Barrus is informed by the law firm handling the estate of Dorothy Jones Ripperdan that the estate is not subject to probate; rather, a Petition to Determine Succession to Real Property. Copies of the Primary and Secondary Assignments of Beneficial Interest in the estate have been delivered to the firm handling the matter. In addition, the executor executed and filed an Assumption of Personal Liability for the balance of attorney fees and creditor's claim. The \$1,500 will be used to pay the filing fee and a portion of the attorney's statutory fee which are expenses of administration and have priority over payment of unsecured creditor's claims.

For an extended period, the executor did not respond to inquiries from his office. They had prepared a Petition for Final Distribution that was signed on 9-24-10; however, no provision had been made for payment of fees or creditor's claim. The attorney offered to take a note secured by a deed. Subsequently, the residence fell into foreclosure and it was anticipated that it would be lost. However, in August 2011, Mr. Barrus received word from Brian Gurule, a friend of the executor's, that there was a potential sale. Mr. Barrus advised Brian that there were estate expenses that would need to be paid from sale proceeds.

The sale closed on 9-9-11 without Attorney Barrus' knowledge. He had not had contact with the executor since 9-24-10, and was not contacted by the executor or the title company. On 12-15-11, he attempted to call the executor, but the phone number was no longer in service. He contacted Brian, who informed him of the sale. Brian then arranged with the executor to send \$1,500.00 immediately and was hopeful to make regular payments on the balance.

In July 2012, Mr. Barrus received a call from a local law firm to inform the executor that he is an heir of his great-aunt's estate that was subject to a Petition to Determine Succession to Real Property. Mr. Barrus attempted to contact the executor via the realtor who sold this real property, and was able to leave several voice messages. Mr. Barrus was aware that the executor had had a stroke, but did not know the nature of his incapacity. The office revised the Petition for Final Distribution and Mr. Barrus personally drove to the executor's new home for signatures. He advised him that he had violated his duties as executor and proposed that he assume personal liability for payment of the creditor's claim and fees, and also assign his interest in the estate. He agreed.

Contrary to the examiner's assertion, Mr. Barrus has done everything he could to ensure this matter timely closed. He did not control the executor or the sale of the residence. The delay was due, in part, to the sale of the residence, and in part because the executor failed to keep in contact with Mr. Barrus. In Mr. Barrus' opinion, the executor knew he had done something wrong and did not want to deal with it. The delay did, however, allow the residence to be sold instead of lost in foreclosure, and was, in that sense, in the best interest of the estate. The estate would not be ready for this hearing but for Mr. Barrus' efforts. As soon as the material facts were known, this petition was filed. Mr. Barrus did all he could in as timely a manner as possible given the circumstances.

SEE ADDITIONAL PAGE

NEEDS/PROBLEMS/COMMENTS:

- 1. Petitioner requests that the Court approve his acts and proceedings as Executor including:
 - borrowing against and encumbering the real property of the estate without Court authorization, which is a violation of Probate Code §9800,
 - using the funds received for purposes other than the purposes allowed by Probate Code §9800 (also a violation), including the majority for Petitioner's personal use ("a new business venture").
 - This constitutes an unauthorized preliminary distribution in violation of Probate Code §11621, which states that the Court may authorize preliminary distribution if it appears that it may be made without loss to creditors or injury to the estate.
 - Petitioner then sold the real property and used the remainder of the funds for personal use, which is further unauthorized preliminary distribution in violation of Probate Code § 11621.
 - Although Petitioner is the sole heir, his duty is first to the estate, including administration and payment of creditors. It appears that Petitioner's actions have resulted in an insolvent estate and an unpaid creditor.
 - The Court may require that any language approving these acts be stricken from the final order.
- 2. Petitioner requests to assume personal liability for payment of the creditor's claim and executed "Priority" and "Secondary Assignments of Beneficial Interest in Estate of Dorothy Jones Ripperdan," wherein he assigns his beneficial interest as an heir of his deceased great-aunt for payment of the balance of the attorney fees and Bank of America Creditor's Claim.
 - Petitioner explains that he was recently advised that he is an heir of this estate, which "<u>may</u>" be enough to pay the Creditor's Claim and the remainder of the statutory attorney fees, but that the principal asset of the estate is held by the California Controller's office and will "probably not be paid to him any time soon."

Attorney Barrus' declaration indicates that the estate is not being probated, but is subject to a Petition to Determine Succession.

The Court may require clarification and authority for assumption and/or reliance on assignment for payment of the creditor's claim.

Kruthers, Heather H (for Petitioner/Administrator Public Administrator)

Petition for an Order Approving Extraordinary Commissions for the Public Administrator [Prob. C. 7666]

		PUBLIC ADMINISTRATOR/ADMINISTRATOR of	NEEDS/PROBLEMS/COMMENTS:
		the Estate is petitioner.	
nt. from		Petitioner states he was appointed as Administrator of the estate under Probate	
Aff.Sub.Wit.		Code 7660.	
Verified		In the course of the administration of the	
Inventory			
PTC		, , ,	
Not.Cred.			
Notice of Hrg		reasonable fee for such services is \$1,000.00.	
Aff.Mail	W/	In addition, petitioner filed the First and Final	
Aff.Pub.		•	
Sp.Ntc.	W/	reasonable value of such services is \$248.00.	
Pers.Serv.		Therefore Politioner prays for an Order that	
Conf. Screen		merelore, reillioner prays for an order mai.	
Letters		The Court authorize payment to the Fresno	
		County Public Administrator in the sum of	
•		•	
Receipt		extraordinary services to the estate.	
CI Report			
9202			
Order			
Aff. Posting			Reviewed by: KT
			Reviewed on: 9/28/12
			Updates:
			Recommendation: File 5 - Crider
	Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order	Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. V/ Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order Aff. Posting Status Rpt UCCJEA Citation	Administrator of the estate under Probate Code 7660. In the course of the administration of the estate the Public Administrator's office has performed extraordinary services regarding the sale of the Decedent's real property. Pursuant to Local Rule 7.18(B)(1) the reasonable fee for such services is \$1,000.00. Aff.Mail W/ Aff.Pub. Sp.Ntc. W/ Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order Aff. Posting Status Rpt UCCJEA Citation Administrator of the estate under Probate Code 7660. In the course of the administration of the estate has performed extraordinary services regarding the sale of the Decedent's real property. Pursuant to Local Rule 7.18(B)(1) the reasonable fee for such services is \$1,000.00. In addition, petitioner filed the First and Final Fiduciary tax return for this estate. The reasonable value of such services is \$248.00. Therefore, Petitioner prays for an Order that: The Court authorize payment to the Fresno County Public Administrator in the sum of \$1,248.00 as reasonable compensation for extraordinary services to the estate.

Palley, John B. of Sacramento (for Dorothy Harriet – Petitioner – Executor)

(1) First and Final Report of Executor on Waiver of Accounting and Petition for Its Settlement and (2) Allowance of Commission to Executor, Fees to the Attorney and (3) Final Distribution

DOD: 06/14/2008			DOROTHY HARRIET, Executor, is	NEEDS/PROBLEMS/COMMENTS:
			petitioner.	
Со	Cont. from			Order does not comply with Local
	Aff.Sub.Wit.		Account waived	Rule 7.6.1. Need new order.
✓	Verified		I&A - \$229,119.48	2. Pursuant to Local Rule 7.13, a
✓	Inventory		POH - \$238,202.40	petition requesting distribution on a waiver of accounting shall include
	PTC		Executor – Waives	the current status of all inventoried
	Not.Cred.		47.500.00	items. The petition must include a list
✓	Notice of Hrg		Attorney - \$7,582.39	of the property on hand for distribution as it exists at
✓	Aff.Mail	w/	Costs - \$1392.18	the time of the petition and not
	Aff.Pub.		(filing fees, publication, certified copies, court call, probate referee)	merely as shown on the inventory and appraisal, unless there has
	Sp.Ntc.		Coon can, probate foreign	been no change. The Inventory &
	Pers.Serv.		Distribution, pursuant to decedent's Will,	Appraisal lists 21 Shares of Goodrich
	Conf. Screen		is to:	Corporation however it is not
✓	Letters 05/	03/2012	Dorothy Harriet – 100% in real property	reflected in the Assets on Hand for Distribution attached to the petition.
	Duties/Supp		and personal property.	Need the current status of the 21
	Objections			shares of Goodrich Corporation.
	Video Receipt			
	CI Report			
✓	9202			
✓	Order			
	Aff. Posting			Reviewed by: KT / LV
	Status Rpt			Reviewed on: 10/01/2012
	UCCJEA			Updates:
	Citation			Recommendation:
✓	FTB Notice			File 6 - Harriet

Knapp, Bonnie J (for Petitioner/Special Administrator Eric Schloen)

Petition for Termination of Further Proceedings and Discharge of the Personal Representative [Prob. C. 12251; Gov. C. 70657(a)(1)]

חר	D: 10/20/11		FPIC SCHIOEN petitioner was	NEEDS/PROBLEMS/COMMENTS:
	2. 10/20/11		ERIC SCHLOEN, petitioner, was	TTEESO, I NOBELITIO, CONTINUENTO.
			appointed Special Administrator	
			without bond. Letters will expire	
Co	ont. from		5/13/13.	
	Aff.Sub.Wit.			
	Verified		Petitioner was appointed Special	
✓			Administrator for the limited	
	Inventory		purpose of obtaining Medi-Cal	
	PTC		benefits for the decedent to settle	
	Not.Cred.		medical bills incurred by decedent	
✓	Notice of Hrg		prior to his death. Petitioner is an	
✓	Aff.Mail	W/	agent of hospital where decedent	
	Aff.Pub.		died.	
	Sp.Ntc.			
	Pers.Serv.		I & A - waived per order	
	Conf. Screen		appointing special administrator.	
	Letters			
	Duties/Supp		Petitioner states he performed all	
	Objections		duties necessary as special	
	Video		administrator as he obtained	
	Receipt		health benefits for the decedent,	
L	CI Report		the estate has no assets and there	
	9202			
✓	Order		is no longer a need for a special	
	Aff. Posting		administrator.	Reviewed by: KT
	Status Rpt			Reviewed on: 9/28/12
	UCCJEA		Petitioner Prays for an Order:	Updates:
	Citation		1) Terminating the administration	Recommendation: SUBMITTED
	FTB Notice		of the estate and discharging	File 7 - West
			the Special Administrator.	

Atty Walters, Jennifer (for Leonard Lopez and Rachel Ben)

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DC	DD: 7/17/12	KATHRYN LOPEZ, daughter, is	NEEDS/PROBLEMS/COMMENTS:
		petitioner and requests	
		appointment as Administrator	Note: A competing Petition for Probate has been filed by Leonard Lopez and
		with bond set at \$150,000.00.	Rachel Ben and is set for hearing on
Co	ont. from 083012	- Will 1 βοι ια 301 αι φτου,000.00.	11/6/12.
	Aff.Sub.Wit.	Full IAEA - ?	
✓	Verified		Continued from 8/30/12 as of 10/2/12 the following issue remains:
	Inventory	Decedent died Intestate.	
	PTC		Need Affidavit of Publication.
	Not.Cred.	Residence: Del Rey	
	Notice of Hrg	Publication: NFFD	
✓	Aff.Mail W,		Note: If the petition is granted, status
	Aff.Pub. X		hearings will be set for the filing as
	Sp.Ntc.	Estimated value of the estate:	follows:
	Pers.Serv.	Personal property - \$50,000.00	
	Conf. Screen	<u>Real property</u> - \$100,000.00	• Friday, November 2, 2012 at 9:00
✓	Letters	Total - \$150,000.00	a.m. in Department 303, for the filing of the bond.
✓	Duties/Supp		
	Objections	Probate Referee: RICK SMITH	• Friday, March 8, 2013 at 9:00 a.m. in Department 303, for the filing of the
	Video		inventory and appraisal.
	Receipt		
	CI Report		• Friday, December 6, 2013 at 9:00
	9202		a.m. in Department 303, for the
✓	Order		filing of the first account or petition for final distribution.
			Pursuant to Local Rule 7.5 if the
			required documents are filed 10 days
			prior the date set the status hearing will
			come off calendar and no
			appearance will be required.
	Aff. Posting		Reviewed by: KT
	Status Rpt		Reviewed on: 9/28/2012
	UCCJEA	_	Updates:
	Citation	_	Recommendation:
	FTB Notice		File 8 - Lopez

Hemb, Richard E (for Petitioner Adrianne Wallace)

Petition to Determine Succession to Real Property (Prob. C. 13151)

	D 10/10/1000		Petition to Determine Succession to Real Prop	
DC	D: 12/18/1988		ADRIANNE WALLACE , daughter, is	NEEDS/PROBLEMS/COMMENTS:
			petitioner.	
			40 days since DOD.	
Co	nt. from		,	
	Aff.Sub.Wit.		No other proceedings.	
✓	Verified		_	
	Inventory		Decedent died intestate.	
	PTC		40-00-00	
	Not.Cred.		1 & A - \$85,000.00	
1	Notice of		Politioner requests Court	
Ľ	Hrg		Petitioner requests Court	
1	Aff.Mail	W/	determination that Decedent's	
	Aff.Pub.		interest in real property located in	
	Sp.Ntc.		Fresno County passes to her	
 	Pers.Serv.		pursuant to intestate succession.	
-	Conf.		pulsual il 10 il ilestate succession.	
	Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
	9202			
1	Order			
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 9/28/12
	UCCJEA			Updates:
	Citation			Recommendation: SUBMITTED
	FTB Notice			File 9 - Miller

Helon, Marvin T (for Petitioner Wilma R. Ellis-Johnson)

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450

DC	D: 7/1/12		WILMA R. ELLIS-JOHNSON,	NEEDS/PROBLEMS/COMMENTS:
			surviving spouse is petitioner and	
			requests appointment as	Note: If the petition is granted, status
			Administrator of the Estate	hearings will be set for the filing as follows:
Со	nt. from		without bond.	
	Aff.Sub.Wit.		William Bolla.	
✓	Verified		All heirs waive bond.	Friday, March 8, 2013 at 9:00 a.m. in Department 303, for the filing of the
	Inventory			inventory and appraisal.
	PTC		Full IAEA – o.k.	
	Not.Cred.			• Friday, December 6, 2013 at 9:00
	Notice of Hrg		Decedent died intestate.	a.m. in Department 303, for the filing of the first account or petition for final
/	Aff.Mail	W/		distribution.
–		,	Residence: Fresno	Duranget to Local Dula 7.5 if the required
✓	Aff.Pub.		Publication: Fresno Business	Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the
	Sp.Ntc.		Journal.	date set the status hearing will come off
	Pers.Serv.			calendar and no appearance will be
	Conf.			required.
	Screen		Estimated value of the estate:	
✓	Letters			
✓	Duties/Supp		Personal property - \$ 20,000.00 Real property - \$468,000.00	
	Objections		Total - \$488,000.00	
	Video		¥, 2	
	Receipt			
	CI Report		Probate Referee: RICK SMITH	
	9202		FIODUIE REIEIEE. RICK SMIIII	
✓	Order			
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 10/3/12
	UCCJEA			Updates:
	Citation			Recommendation: SUBMITTED
	FTB Notice			File 10 - Johnson
				10

Mortimer, Steven R (for Petitioner Gladys Autry)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 4/27/2012		GLADYS AUTRY, named executor	NEEDS/PROBLEMS/COMMENTS:	
		without bond, is petitioner.		
Cont. from Aff.Sub.Wit.		Full IAEA – o.k.	Need name and date of death of deceased spouse pursuant to Local Rule 7.1.1D.	
✓	Verified Inventory PTC	Will dated: 10/29/1996	Note: If the petition is granted, status hearings will be set for the filing as follows:	
<i>y</i>	Not.Cred. Notice of Hrg Aff.Mail	Residence: Fresno Publication: Fresno Business Journal	Friday, March 8, 2013 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.	
✓	Aff.Pub.		Friday, December 6, 2013 at 9:00 a.m. in Department 303, for the filing	
Sp.Ntc.		Estimated value of the estate:	of the first account or petition for final	
	Pers.Serv.		distribution.	
	Conf. Screen	Personal property - \$1,000.00 <u>Real property</u> - \$40,000.00	Pursuant to Local Rule 7.5 if the required	
✓	Letters	Total - \$41,000.00	documents are filed 10 days prior the date set the status hearing will come off	
✓	Duties/Supp		calendar and no appearance will be required.	
	Objections	Probate Referee: RICK SMITH	required.	
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting		Reviewed by: KT	
	Status Rpt		Reviewed on: 10/1/12	
	UCCJEA		Updates:	
	Citation		Recommendation:	
	FTB Notice		File 11 - Brassart	
	11			

Walters, Jennifer (for Petitioner Jennie Orona)

Status Hearing Re: Filing of the Inventory and Appraisal

Age:	NEEDS/PROBLEMS/COMMENTS:
DOD:	
	OFF CALENDAR. Inventory and
	appraisal filed on 7/31/12.
Cont. from	
Aff.Sub.Wit.	
Verified	
Inventory	
PTC	
Not.Cred.	
Notice of	
Hrg	
Aff.Mail	
Aff.Pub.	
Sp.Ntc.	
Pers.Serv.	
Conf.	
Screen	
Letters	
Duties/Supp	
Objections	
Video	
Receipt	
CI Report	
9202	
Order	
Aff. Posting	Reviewed by: KT
Status Rpt	Reviewed on: 10/1/12
UCCJEA	Updates:
Citation	Recommendation:
FTB Notice	File 12 - Orona

Gonzalez, Rick (pro per Administrator)

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 5/12/2010	RICK GONZALEZ, son, was appointed Administrator with Limited IAEA authority	NEEDS/PROBLEMS/COMMENTS:
	and without bond on 4/26/12.	
		OFF CALFAIDAD
Cont. from	Letters issued on 4/26/12.	OFF CALENDAR. Inventory and
Aff.Sub.Wit.	1	appraisal filed on 10/2/12
Verified	Inventory and appraisal was due	
Inventory	9/26/12.	
PTC	Minute Order dated 4/26/12 set this	
Not.Cred.	status hearing for the filing of the	
Notice of	inventory and appraisal. Petitioner Rick	
Hrg	Gonzalez was present at the hearing.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report 9202		
Order		
Aff. Posting	1	Reviewed by: KT
Status Rpt	1	Reviewed on: 10/1/12
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 13 - Borunda

Huerta, Maria Amparo (pro per Petitioner/paternal grandmother)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 7 years			TEMPORARY EXPIRES 10/3/12	NEEDS/PROBLEMS/COMMENTS:
			MARIA AMPARO HUERTA, paternal grandmother, is petitioner.	Minute Order from the hearing on the temporary guardianship states
Со	nt. from		Father: GERMAN SANCHEZ – consents and	"with respect to visitation, the Court finds that the allegations are
	Aff.Sub.Wit.		waives notice.	sufficient in severity and denies
✓	Verified		Mother: ANITA VILLARREAL – personally served	visitation to the mother."
	Inventory		on 8/7/12.	
	PTC			
	Not.Cred.		Paternal grandfather: Teofilo Sanchez – served by mail on 8/7/12.	
✓	Notice of Hrg		Maternal grandfather: Raul Villarreal –	
✓	Aff.Mail	W/	Declaration of Due Diligence filed on 8/9/12.	
	Aff.Pub.		Maternal grandmother: Sylvia Garza – served by mail on 8/8/12.	
	Sp.Ntc.		27 Mail 311 37 37 12.	
✓	Pers.Serv.	W/	Petitioner alleges: The mother has violated her	
✓	Conf. Screen		probation and was arrested for domestic violence. Since the parents have separated	
✓	Letters		the parents have been unable to provide	
√	Duties/Supp		stability for the minor. Also, mom's present boyfriend has hit mom in the minor's presence.	
	Objections		He has also thrown the minor against the wall in	
	Video		a fit of rage.	
	Receipt		Court Investigator Jennifer Daniel's Report filed	
✓	CI Report		on 9/26/12.	
	9202			
✓	Order			
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 10/1/12
✓	UCCJEA			Updates:
	Citation	<u> </u>		Recommendation:
	FTB Notice			File 14 - Sanchez

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Beebe, James Kern (pro per Petitioner/father)

Beebe, Yvette Renee (pro per Petitioner/mother)

Petition for Appointment of Guardian of the Estate (Prob. C. 1510)

Age: 9 years			THERE IS NO TEMPORARY.	NEEDS/PROBLEMS/COMMENTS:	
Cc ✓	nt. from Aff.Sub.Wit. Verified Inventory PTC Not.Cred.		No temporary was requested. JAMES KERN BEEBE, father, and YVETTE RENEE BEEBE, mother, are petitioners. Paternal grandparents – deceased. Maternal grandfather: Earl Bradford – consents and waives notice. Maternal grandmother: Jeannette Bradford – consents and waives notice.	Please see related case on page 16 of this calendar. 1. Need Confidential Guardian Screening form for proposed guardians James Beebe and Yvette Beebe. Note: If the petition is granted, status hearings will be set for the filing as follows:	
\frac{1}{\sqrt{1}}	Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen X Letters Duties/Supp Objections Video Receipt	1/A (Estimated value of the estate: \$13,634.00 – to be placed into a blocked account. Petitioners state the minor is a beneficiary of an annuity from his deceased grandmother. A guardianship is necessary to collect the funds. Probate Referee: Rick Smith	 Friday, November 9, 2012 at 9:00 a.m. in Department 303, for the filing of the receipt for blocked account Friday, March 15, 2013 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Friday, December 13, 2013 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required. 	
	Aff. Posting			Reviewed by: KT	
	Status Rpt			Reviewed on: 10/1/12	
	UCCJEA N/A			Updates:	
	Citation			Recommendation:	
	FTB Notice			File 15 - Beebe	

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Atty Beebe, James Kern (pro per Petitioner/father)

Atty Beebe, Yvette Renee (pro per Petitioner/mother)

Petition for Appointment of Guardian of the Estate (Prob. C. 1510)

Age: 8 years THERE IS NO TEMPORARY. **NEEDS/PROBLEMS/COMMENTS:** No temporary was requested. Please see related case on page 15 of this calendar. **JAMES KERN BEEBE**, father, and **YVETTE RENEE BEEBE**, mother, are petitioners. 2. Need Confidential Guardian Cont. from Screening form for proposed Paternal grandparents – deceased. Aff.Sub.Wit. guardians James Beebe and Maternal grandfather: Earl Bradford -Yvette Beebe. Verified consents and waives notice. Maternal arandmother: Jeannette Inventory **Note:** If the petition is granted, status Bradford – consents and waives PTC hearings will be set for the filing as notice. Not.Cred. follows: Notice of Hrg N/A Estimated value of the estate: Aff.Mail **Friday, November 9, 2012** at 9:00 \$13,634.00 - to be placed into a a.m. in Department 303, for the Aff.Pub. blocked account. filing of the receipt for blocked Sp.Ntc. account Pers.Serv. **Petitioners state** the minor is a Conf. Screen Χ beneficiary of an annuity from his **Friday, March 15, 2013** at 9:00 a.m. Letters deceased grandmother. A in Department 303, for the filing of guardianship is necessary to collect the inventory and appraisal. **Duties/Supp** the funds. **Objections Friday, December 13, 2013** at 9:00 Video a.m. in Department 303, for the filing of the first account or petition Receipt for final distribution. **CI Report** N/A Probate Referee: Rick Smith 9202 Pursuant to Local Rule 7.5 if the Order required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required. Aff. Posting Reviewed by: KT **Status Rpt** Reviewed on: 10/1/12 **UCCJEA** N/A **Updates:** Citation **Recommendation: FTB Notice** File 15 - Beebe

FTB Notice

Atty Braga, Nancy Lynn (Pro Per – Petitioner – Maternal Grandmother)

Atty Braga, Tony L Jr. (Pro Per – Petitioner – Maternal Step Grandfather)

Petition for Appointment of Temporary Guardianship of the Person

Keely Gibbs NANCY LYNN BRAGA and TONY L. BRAGA **NEEDS/PROBLEMS/COMMENTS:** Age: 15 JR., maternal grandmother and maternal step grandfather, are petitioners. 1. Need Notice of Hearing. **Kyle Gibbs** Age: 13 Father: STEVEN JEFFERY GIBBS 2. Need proof of personal service five (5) Court days prior to the hearing of the Notice of Hearing along with a Mother: CHRISTINA LYNN GIBBS Cont. from copy of the Petition for Appointment Aff.Sub.Wit. of Guardian or consent and waiver Paternal grandfather: Rob Gibbs Paternal grandmother: Pat Gibbs of notice or declaration of due Verified diliaence for: Inventory Maternal grandfather: Stanley Higuera Steven Jeffery Gibbs (Father) PTC • Christina Lynn Gibbs (Mother) Keely Gibbs (Minor) **Petitioner alleges:** that the mother is in Not.Cred. financial crisis and the children have not Kyle Gibbs (Minor) Notice of been attending school. The mother is Hrg threatening to take the children to Nevada 3. UCCJEA does not provide the Aff.Mail and leave them with their father who is residence of the minor's for the past Aff.Pub. alleged to abuse alcohol. Petitioner also five years as required. Sp.Ntc. alleges that the mother is behind on rent and is about to be evicted. Pers.Serv. Χ Conf. A letter from the minor's adult sister is Screen attached to the petition which states she is Letters concerned about her younger siblings living with the mother as the children have missed **Duties/Supp** several days of school, as well as the mother **Objections** is facing eviction and behind on her bills. She Video also states that their father and his wife Receipt abuse alcohol daily. She believes it would be in the best interest of her siblings to reside **CI Report** with the petitioner. 9202 Order Reviewed by: KT / LV Aff. Posting **Reviewed on:** 10/01/2012 **Status Rpt UCCJEA Updates: Recommendation:** Citation

File 17 - Gibbs

Ormond, John K. (for Rebecca Lewis – Mother – Conservator – Petitioner)

Second Amended Sixth Account and Report of Conservator in Re: Conservatorship Estate and Petition for Its Settlement with Accompanying Declaration of John K. Ormond Re: Attorney's Fees and Costs and Petition for Settlement of Second Amended Fifth Account

Aff.Sub.Wif. Beginning POH: \$434,163.45 Verified Ending POH: \$576,676.68 Inventory 2nd Amended 6th Account Period: 11-1-09 through 10-31-11 Not.Cred. Accounting: \$736,242.50 V Notice of Hrg Beginning POH: \$576,676.67 Ending POH: \$723,534.39 Aff.Pub. Counting: \$723,534.38 cash)	Examiner's Note: An amended petition should be complete in itself without reliance on, or reference to, previously filed items. This petition is filed as an amended petition to amend two separate previously filed
Aff.Sub.Wit. Beginning POH: \$434,163.43 ✓ Verified 2nd Amended 6th Account Period: Inventory 2nd Amended 6th Account Period: PTC 11-1-09 through 10-31-11 Not.Cred. Accounting: \$736,242.50 ✓ Notice of Hrg Beginning POH: \$576,676.67 ✓ Aff.Mail W/o Aff.Pub. POH:	An amended petition should be complete in itself without reliance on, or reference to, previously filed items. This petition is filed as an amended petition to amend two separate previously filed
	accountings, but only provides certain amended schedules and refers the Court to <u>unspecified</u> previously filed documents rather
replaced by the attached Summary and Schedule E (Non-Cash Assets at End of Account Period) for both	than providing complete documentation in the convenient format set forth in Probate Code §1060.
Status Rpt petition be given as required by law; UCCJEA 2. The Court make orders approving, allowing and settling the SIXTH account, and, awarding R	Reviewed by: skc Reviewed on: 9-28-12 Updates: Recommendation: File 18 - MacIsaac

18 Lori Lavonne MacIsaac (CONS/PE)

Case No. 0562998

1. This petition does not address or request conservator fees. The proposed order indicates \$1,000.00; however, as noted above, this petition refers the Court to previously filed documents without specific reference to which documents. Therefore, need clarification regarding the amount requested for conservator fees.

<u>Note</u>: A status hearing will be set for the filing of the Seventh and Final Accounts pursuant to Probate Code §2620(b) for Friday 1-11-13 (for the period that ended on the date of death and for the period subsequent to the date of death). If the accounts are filed prior to that date, the status hearing will come off calendar.

Atty

Beatrice Day (Estate)

Moore, Susan L. (for Janelle Bowman – Executor – Petitioner)

(1) Petition for Settlement of First and Final Account, (2) Petition for Final Distribution and for (3) Allowance of Compensation for Ordinary and Extraordinary Services (Prob. C. 11640)

DOD: 5-25-07		JANELLE BOWMAN, Executor with Full IAEA without bond,	NEEDS/PROBLEMS/
DOD. 3-23-07		is Petitioner.	COMMENTS:
Cont. from 092612 Aff.Sub.Wit.	<u> </u>	Accounting: \$175,000.00 Beginning POH: \$175,000.00 Ending POH: \$18,371.82 (cash)	Continued from 9-26-12
✓ Verified		Executor (Statutory): \$1,060.00	
✓ Inventory			
✓ PTC		Attorney (Statutory): \$1,060.00	
✓ Not.Cred.		Attorney (Extraordinary): \$4,570.00	
✓ Notice of Hrg✓ Aff.Mail) A /	for extraordinary services to recover possession of the	
Aff.Pub.	W	real property (14.3 hours), and to secure and sell the real property (2.9 hours)	
Sp.Ntc.			
Pers.Serv.		Closing: \$800.00 (reserve for taxes/misc.)	
Conf. Screen		Attorney Moore's Declaration states unlawful detainer	
✓ Letters	7-20-09	was necessary to remove occupants Beverly Day and	
Duties/Supp Objections		Nancy Rozidilla, two of the beneficiaries who had been	
Video Receipt	<u> </u>	allowed to continue their residence at the property for more than two years after their mother's death. THe	
Cl Report		declaration states that after the estate recovered	
→ 9202		possession, the two continued to reside in a van on the	
✓ Order		property and were believed to have been going in and	
Aff. Posting		out of the home through a window, requiring another writ of possession, lockout, and turnover of possession to	Reviewed by: skc
Status Rpt UCCJEA		the estate. Because the personal representative lives out	Reviewed on: 10-1-12 Updates:
Citation		of state, Attorney Moore worked with real estate agents	Recommendation:
✓ FTB Notice		and contractors for the sale and avoided a 6% commission on the sale.	File 19 - Day
		Petitioner requests that such extraordinary fees expended to recover possession of the property from Beverly Day and Nancy Day be charged against their distributable share of the estate, which amount is \$3,772.50 in attorney fees plus \$770.84 in costs, for a total of \$4,543.34. However, since that amount exceeds their shares, Petitioner requests that their shares be abated in their entirety and the distributable balance be distributed among the remaining beneficiaries. Distribution pursuant to Decedent's will, Notice of Lien filed 7-16-12, and request for abatement: Janelle Bowman: \$3,627.27 Laura Lee Flores-Wheeler: \$3,627.27 Eileen Lindsey: \$1,813.64 Shanna Johnston: \$1,813.64, less \$151.65 payable to the Victim Compensation and Government Claims Board	